

Message Text

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ACTION EB-07

INFO OCT-01 EUR-12 ISO-00 AGR-10 AID-05 COME-00 IO-13

TRSE-00 USIA-15 CIAE-00 INR-07 NSAE-00 /070 W

----- 114918

R 131832Z MAY 76

FM AMEMBASSY OTTAWA

TO SECSTATE WASHDC 9793

UNCLAS OTTAWA 1927

E.O. 11652: N/A

TAGS: EAGR CA

SUBJECT: QUARTERLY MEAT CABLE

PASS AGRICULTURE

REF (A) OTTAWA 3065, AUGUST 15, 1975; (B) OTTAWA 601, 2/13/76

1. GROSS NATIONAL PRODUCT (1971 DOLLARS) PERCENTAGE CHANGE
FROM PREVIOUS QUARTER.

QUARTER	1974	1975	1976
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1ST	0.9	-0.8	1.2 EST.
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2ND	-0.3	0.8	
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3RD	0.0	1.0	
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4TH	-0.3	0.4	
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2. SUPPLY AND DISPOSITION: PORK, MUTTON AND LAMB, POULTRY
(THOUSAND POUNDS).

(A) PORK

STOCKS, JAN. 1	33,114	22,892	16,592
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PRODUCTION	1,347,230	1,090,424	1,050,000
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IMPORTS	80,190	98,679	140,000
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TOTAL SUPPLY	1,460,534	1,211,995	1,206,592
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EXPORTS	92,174	89,687	95,000
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DOM. DISAPPEARANCE	1,345,468	1,105,716	1,096,592
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STOCKS, DEC. 31	22,892	16,592	15,000
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PER CAPITA (1 LBS.) 59.9 48.4 47.5

POST

	REVISED	FORECAST	
	1974	1975	1976

(B) MUTTON AND LAMB

STOCKS, JAN 1	7,233	6,814	4,123
PRODUCTION	18,167	18,090	19,500
IMPORTS	38,397	-44,643	49,000
TOTAL SUPPLY	63,797	69,547	72,623
EXPORTS	126	187	200
DOM. DISAPPEARANCE	56,857	65,237	69,323
STOCKS, DEC. 31	6,814	4,123	3,100
PER CAPITA (1LBS.)	2.5	2.9	3.0

(C) POULTRY

STOCKS, JAN 1	75,899	90,110	44,384
PRODUCTION	1,034,769	896,263	961,000
IMPORTS	22,369	28,625	35,200
TOTAL SUPPLY	1,133,037	1,014,998	1,040,584
EXPORTS	20,488	5,070	4,000
DOM. DISAPPEARANCE	1,022,439	965,544	984,684
STOCKS, DEC. 31	90,110	44,384	51,900
PER CAPITA (1BS.)	45.4	42.3	42.9

3. BEEF PRODUCTION

A) ESTIMATE OF CATEL NUMBER SON FARMS (THOUSANDS)

	1974	1975	1976
JULY 1	14,948	15,260	14,700
DEC 31	14,008	13,696	13,900

B) SLAUGHTER(THOUSANDS)

CATTLE	3,629	4,070	4,200
CALVES	616	1,009	1,000
TOTAL	4,245	5,079	5,200

(C) SUPPLY AND DISPOSITION (THOUSAND POUNDS CARCASS WIEGHT EQUIVALENT).

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	REVISED	POST FORECAST	
	1974	1975	1976
STOCKS, JAN 1	56,729	47,631	49,895
PRODUCTION TOTAL	2,076,521	2,313,146	2,385,000
BEEF	1,999,106	2,190,873	2,270,000
VEAL	77,415	122,273	115,000
IMPORTS TOTAL	180,153	195,447	220,000
BONE-IN	12,059	7,859	8,000

BONELESS FRESH	14,171	10,829	11,000
FROZEN	131,278	154,573	178,000
OTHER	22,645	22,186	23,000
TOTAL SUPPLY	2,313,403	2,556,224	2,654,895
EXPORTS-TOTAL	57,578	46,091	90,000
BEEF-BONE-IN	6,944	2,034	6700
9,3)3	41,598	31,707	68,000
CURED	4,114	7,079	9,000
VEAL	965	293	300
N.E.S.	3,957	4,978	6,000
DOM. DISAPPEARANCE	2,208,194	2,460,238	2,509,895
STOCKS, DEC 31	47,631	49,895	55,000
PER CAPITA (1LBS)	98.2	107.8	108.5

4. PRICE FORECAST

(A) WHOLESALE DRESSED MEAT PRICES- SOUTHERN ONTARIO (A1 STEER CARCASSES/SIDES 500-700 LBS. CANADIAN CENTS PER POUND). FINAL 1974 PRICES UNCHANGED FROM REFTEL (A). 1975 ESTIMATE UNCHANGED FROM REFTEL (B).

FORECAST 1976

JANUARY	82.12
FEBRUARY	77.15
MARCH	74.42
APRIL	79.09
MAY	84.00
JUNE	86.00
JULY	87.00
AUGUST	91.00
SEPTEMBER	93.00
OCTOBER	93.00
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NOVEMBER	87.00
DECEMBER	85.00
ANNUAL AVERAGE	84.90

5. QUARTERLY ESTIMATE OF BEEF AND VEAL EXPORTS TO U.S. (THOUSAND POUNDS PRODUCT WEIGHT).

QUARTER	1974	1975	1976
1ST	11,877	1,852	20,163
2ND	6,971	2,464	23,837
3RD	8,905	9,944	20,000
4TH	8,427	8,457	20,000
TOTAL	36,180	22,717	84,000

COMMENT:

1. SECOND QUARTER HOG MARKETINGS EXPECTED TO CONTINUE BELOW 1975 LEVELS BUT AVERAGE CLOSE TO 1975 MARKETINGS LATE IN THIRD QUARTER. INCREASE OF 2 TO 4 PERCENT EXPECTED BY FOURTH QUARTER OF 1976. ON BALANCE, PORK OUTPUT WILL BE COMPARATIVELY SMALL AGAIN THIS YEAR, ABOUT 4 TO 6 PERCENT BELOW 1975 LEVEL.

2. INSPECTED CATTLE SLAUGHTER JANUARY 1 TO APRIL 24, 1976 UP 7.7 PERCENT FROM SAME PERIOD IN 1975. BEEF CATTLE SLAUGHTER NUMBERS EXPECTED TO TREND LOWER IN LAST HALF OF 1976 BUT INCREASE IN CARCASS WEIGHTS REFLECTING MORE FED CATTLE WILL TEMPER DECLINE IN ACTUAL BEEF OUTPUT AND LIKELY HOLD 1976 BEEF PRODUCTION ABOVE 1975 RECORD LEVEL.

3. IN ADDITION TO THIS WE ARE CONFIDENT FOC DAIRY POLICY OF APRIL 11, 1976 WILL RESULT IN APPRECIABLE CULLING OF THE DAIRY HERD. AN ESTIMATED 200,000 TO 250,000 DAIRY COWS WILL PROBABLY ENTER THE SLAUGHTER MARKET IN THE LAST HALF OF 1976. IT'S DIFFICULT TO DETERMINE WHAT PERCENTAGE OF THIS GROUP MIGHT BE EXPORTED LIVE. HOWEVER, WE FEEL SITUATION WILL GIVE ADDED BOOST TO 1976 BEEF OUTPUT AND INCREASE LEVEL OF CANADIAN BEEF AND VEAL EXPORTS TO THE U.S. WHICH TO DATE ARE ALREADY STRONGER THAN PREVIOUSLY EXPECTED.
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